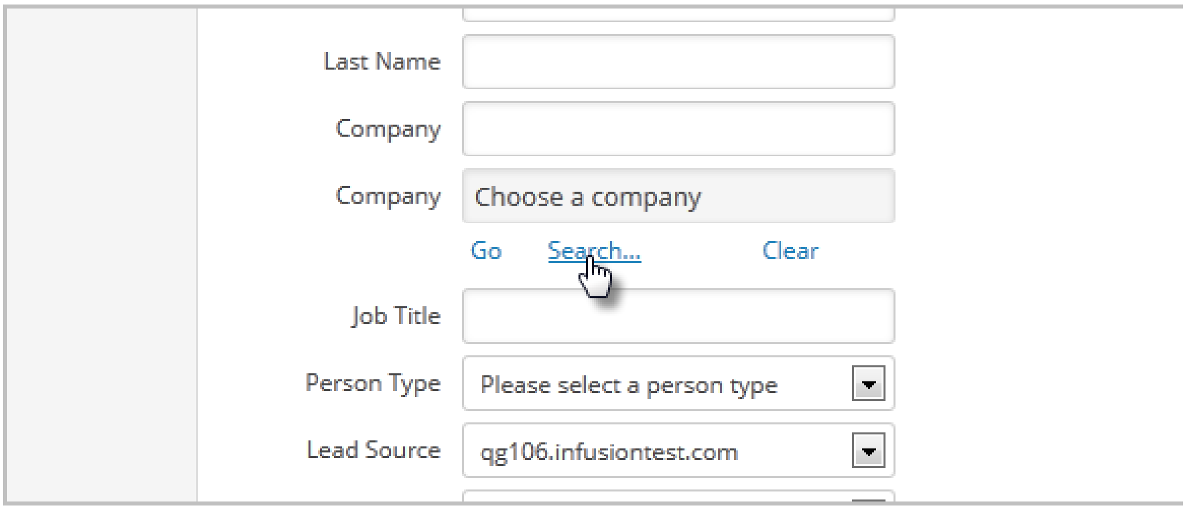
Assign a contact to a company

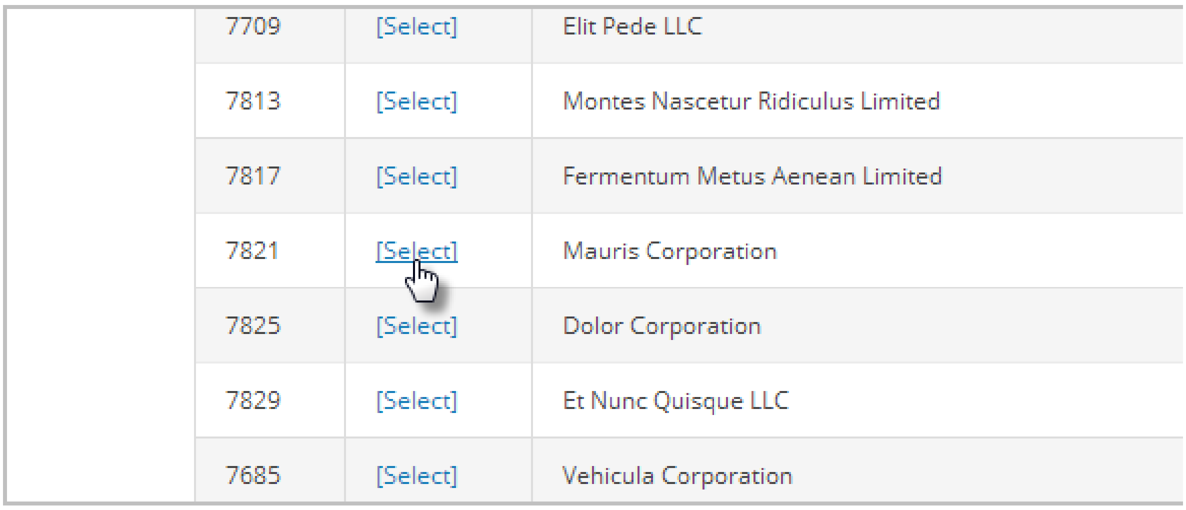
Assign a Contact to a Company From a *Contact* Record

1. Open the contact record.

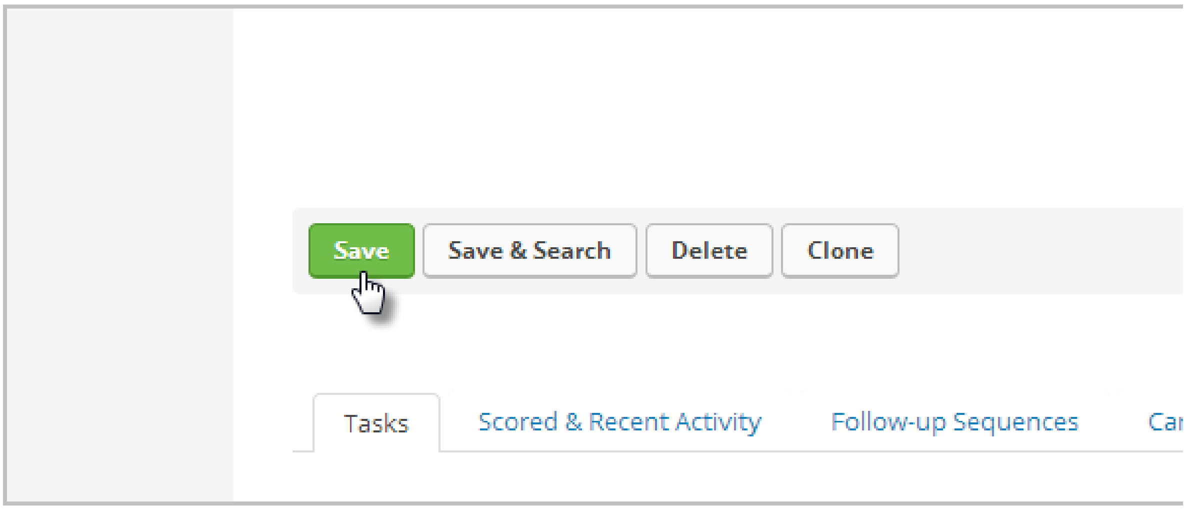
2. Click on **Search** to choose an existing company.



3. Click the **Select** link next to the company that the contact should be assigned to. (Using the search capabilities may make it easier to find the company. Type all or part of the company name and click Search.)

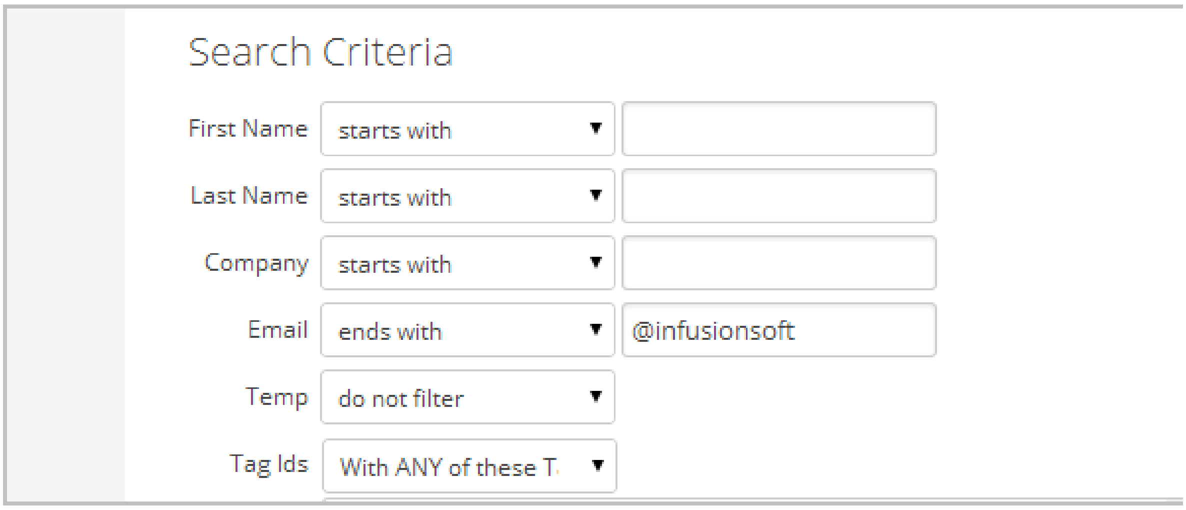


4. Click on the **Save** button to apply the update.



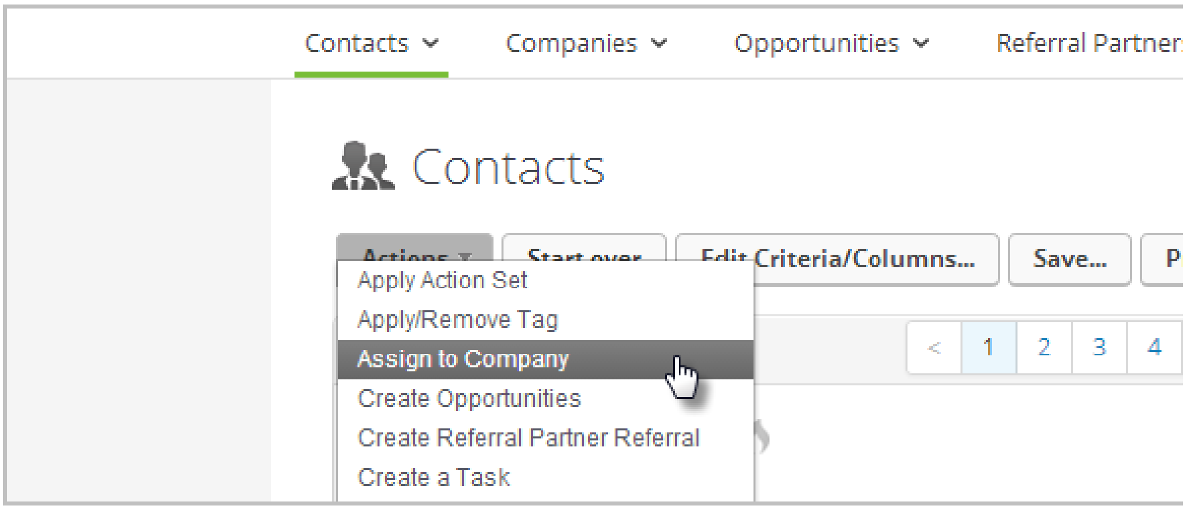
Assign a Contact to a Company From a *Company* Record

1. Do a contact search from CRM > Contacts by entering the search criteria (company name, email address, etc.) for the contacts that should be assigned to a company.

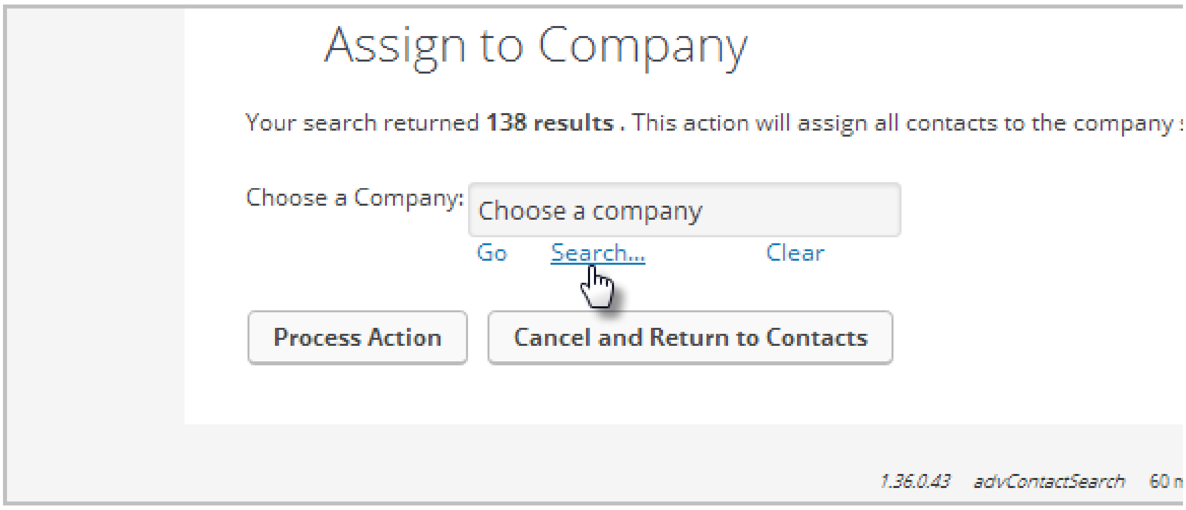


2. Review the list and mark the checkboxes for the contacts that should be assigned to the company.

3. Click on the **Actions** button and select **Assign to Company**.



4. Click on **Search** to choose an existing company.



5. Click on the **Process Action** button.